



**BENDIGO**

UNIVERSITY OF THE THIRD AGE

U3A Bendigo Incorporated, Association No: A0021550A

# Strategic Plan

## 2019 - 2025

**Membership Growth**

Teaching Resources

Venue Management

IT Capacity & Capability

Networking

Learning, Wellbeing and Social Stimulation

Community

**Growth and Increased Capacity**  
Status, Recognition and Significance

Sustainability

Increasing Activity

Capacity Building

**Financial Viability**

**Substantial and Continuous Development**

**U3A Bendigo**



**LIVE LEARN ENJOY**



OBJECTIVE	HOW	WHEN? Milestones 2019	STATUS	WHEN? Milestones 2020-2025	STATUS	WHO?
<p><b>C. Plan to increase the number of subjects or activities that U3A Bendigo provides by a net of 4 per year</b></p>	<ul style="list-style-type: none"> <li>"advertise" in the BUZZ for members who have some "working life" skills or knowledge to run a session on what they have learned from life</li> </ul>	<ul style="list-style-type: none"> <li>Advertised by <b>end June 2019</b></li> <li>Report on annual increases at <b>end 2019</b></li> </ul>		<ul style="list-style-type: none"> <li>Report on annual increases at <b>end 2020, 2021, 2022, 2023, 2024 &amp; 2025</b></li> </ul>		<ul style="list-style-type: none"> <li><b>Executive Officer, &amp; Course Coordinator</b></li> <li><b>Executive Officer, &amp; Course Coordinator</b></li> </ul>
<p><b>D. Set annual goals such that U3A Bendigo increases its membership to at least 3% of the over 65 year old population of Bendigo</b></p>	<ul style="list-style-type: none"> <li>Research projections of population data to project what figure the 3% represents</li> </ul>	<ul style="list-style-type: none"> <li>to CoM by <b>July 2019</b></li> </ul>		<ul style="list-style-type: none"> <li></li> </ul>		<ul style="list-style-type: none"> <li><b>President, Executive Officer</b></li> </ul>

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<p><b>2. IMPROVING OUR STATUS, RECOGNITION AND SIGNIFICANCE:</b></p> <p><b>E. Aim to regularly increase U3A Bendigo Activity documentation to support the implementation of a knowledge and skills database for all courses, classes, groups and activities, every year</b></p>	<ul style="list-style-type: none"> <li>Executive Officer to develop a checklist for Walkers when they go away on camp, involve Julie Harris (Hiker) in discussions</li> <li>1st Aid Certificate holder required for away Hiking trips (cost borne U3A)</li> <li>Development of Course Database, to be used during the implementation of UMAS</li> </ul>	<ul style="list-style-type: none"> <li><b>by October 2019</b></li> <li>1st Aid Certificates obtained by <b>October 2019</b></li> <li>Course Database structure and data entered by <b>end 2019</b></li> </ul>				<ul style="list-style-type: none"> <li><b>Executive Officer</b></li> <li><b>Course Coordinator &amp; Executive Officer</b></li> <li><b>Executive Officer</b></li> </ul>
<p><b>F. To continue with the marketing and advertising strategy within the budget guidelines and continue to develop the image of U3A's "Live, Learn and Enjoy"</b></p>	<ul style="list-style-type: none"> <li>Promote U3A Bendigo through online and off line processes</li> <li>Promotion - Marketing, Advertising - stats say 85% of new members come from existing members/word of mouth.</li> </ul>	<ul style="list-style-type: none"> <li>More actively using Facebook and the website as promotions by <b>December 2019</b></li> <li>Promotions through our Members by <b>December 2019</b></li> </ul>				<ul style="list-style-type: none"> <li><b>Facebook Coordinator &amp; IT support</b></li> <li><b>President, Marketing sub-committee?</b></li> </ul>



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	<ul style="list-style-type: none"> <li>Local newspapers, Church articles to be used more. Maybe Bendigo Advertiser</li> <li>Make regular representation at other community groups &amp; social meetings by way of guest speaking roles</li> <li>Use Radio for publicity more</li> </ul>	<ul style="list-style-type: none"> <li>Increase Media liaison by <b>October 2019</b></li> <li>increase number of talks at local clubs and groups etc.</li> <li>at least 2 local radio stations, by <b>December 2019</b></li> </ul>				<ul style="list-style-type: none"> <li><b>President, Marketing sub-committee?</b></li> <li><b>President, Executive Officer &amp; Marketing sub-committee?</b></li> <li><b>President/Marketing sub-committee?</b></li> </ul>

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<p><b>3. FOCUS ON OUR SUSTAINABILITY AS A COMMUNITY ORGANISATION:</b></p> <p><b>G. To ensure the U3A Bendigo Management Committee undertakes a review of management structures, governance policies and procedures at least every 2 years, and implements its findings and recommendations as required</b></p>	<ul style="list-style-type: none"> <li>Set up a Structure, Governance Policy, and Procedures Review Team with clearly set out Purpose, agreed by CoM</li> <li>Continue to use the <b>Document Review Schedule</b> to drive timely changes to U3A Bendigo documentation</li> </ul>	<ul style="list-style-type: none"> <li><b>October 2019</b></li> <li>Team to document process that will be adopted to conduct the review by <b>August 2019</b></li> <li>Document Review Schedule Report by <b>December 2019</b></li> </ul>		<ul style="list-style-type: none"> <li>Undertake next Structure Review from <b>February 2020</b></li> <li>Findings and Recommendations from Review to be approved by CoM by <b>March / April 2020</b></li> </ul>		<ul style="list-style-type: none"> <li><b>President, Executive Officer, CoM</b></li> <li><b>Document Officer(s)</b></li> <li><b>President &amp; ? Team</b></li> <li><b>CoM</b></li> <li><b>Document Officer(s)</b></li> </ul>

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<p><b>H. Increasingly seek to participate in active learning roles with other U3As, with U3A Network at a central and regional level, with continuing education providers, and with the local community organisations, so to benefit the U3A Bendigo membership and the local community</b></p>	<ul style="list-style-type: none"> <li>• Report to CoM on potential learning roles at a central and regional level</li> <li>• Report to CoM on potential learning opportunities within the local community</li> <li>• Identify what development U3A Committee members need</li> </ul>	<ul style="list-style-type: none"> <li>• <b>July 2019</b></li> <li>• <b>July 2019</b></li> <li>• Hold at least 3 workshops for CoM members a year. eg <b>May, July, October?</b></li> </ul>				<ul style="list-style-type: none"> <li>• <b>President / Network Liaison Officer</b></li> <li>• <b>President / Network Liaison Officer</b></li> <li>• <b>President</b></li> </ul>



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<p><b>4. FOCUS ON OUR FINANCIAL VIABILITY AS A COMMUNITY ORGANISATION:</b></p> <p><b>I. To ensure the U3A Bendigo Management Committee undertakes a review of its finances, budgeting, funding models and forward projections on a monthly basis</b></p>	<ul style="list-style-type: none"> <li>Budget for 2019 - Jan to Dec., as well as 2019 - 2025</li> <li>Financial reporting as against Budget each month</li> </ul>	<ul style="list-style-type: none"> <li><b>2019 Budget</b> to be presented to CoM at <b>March 2019</b> meeting</li> <li>2019 - 2025 Budget to be presented to CoM at March 2019 meeting</li> </ul>	<p><b>Achieved</b></p> <p><b>Achieved</b></p>	<ul style="list-style-type: none"> <li>Financial reporting <b>against 2020 - 2025 Budget</b> to be presented to CoM at each meeting</li> </ul>		<ul style="list-style-type: none"> <li><b>Treasurer, President, Executive Officer</b></li> <li><b>Treasurer, President, Executive Officer</b></li> </ul>
<p><b>J. To manage U3A Bendigo's finances as a not-for-profit business, always cognisant of the need to maintain its financial viability and sustainability</b></p>	<ul style="list-style-type: none"> <li>Financial planning for growth</li> <li>Plan for Financial memberships and facilities</li> </ul>	<ul style="list-style-type: none"> <li>Motion to Members at <b>2019 AGM</b> that Subs go up to \$65 (for each member) \$130 for couples <b>by 2020</b></li> <li><b>After July 1st 2019</b> Subscriptions \$35 and after <b>1st Oct 2019 \$20</b></li> </ul>	<p><b>Achieved</b></p>			<ul style="list-style-type: none"> <li><b>Treasurer, President, Executive Officer</b></li> <li><b>Treasurer, President, Executive Officer</b></li> </ul>



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	<ul style="list-style-type: none"> <li>Apply to Bunnings for 2 x BBQs - Letterhead request</li> <li>Paid employee in charge of Office? New structure to include paid Exec Officer? Could be .4 or .6 position initially</li> </ul>	<ul style="list-style-type: none"> <li>\$35 charge for members of other U3As <b>by 2020</b></li> <li>Recommendation to CoM in <b>March 2019</b> and Motions to Members at <b>2019 AGM</b></li> <li><b>Small Raffles</b> at each Monthly Gathering</li> <li>Monitor idea against growth</li> </ul>	Achieved	<ul style="list-style-type: none"> <li>2 X Bunnings BBQs by <b>end 2020</b></li> </ul>		<ul style="list-style-type: none"> <li>Treasurer, President, Executive Officer</li> <li><b>Treasurer, President, Executive Officer</b></li> <li><b>Executive Officer</b></li> <li><b>Maureen Cross</b></li> <li><b>Treasurer, President, Executive Officer &amp; CoM</b></li> </ul>
<p><b>K. To manage delivery of BUZZ differently to reduce costs - also address comp between BUZZ and Prospectus</b></p>	<p>BUZZ Recommendations:</p> <ul style="list-style-type: none"> <li>email copies to members, unless they ask for them to be posted</li> </ul>	<ul style="list-style-type: none"> <li>BUZZ recommendation s to be given at Convenors' Meeting <b>27th February 2019</b> for feedback</li> </ul>	Achieved			<ul style="list-style-type: none"> <li>Treasurer, President, Executive Officer</li> </ul>

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	<ul style="list-style-type: none"> <li>BUZZ Folding Team could "bundle" copies for Convenors to distribute</li> <li>posted copies provided at \$15 per year</li> </ul>	<ul style="list-style-type: none"> <li>BUZZ facts and recommendations endorsed at <b>2019 AGM</b></li> </ul>				<ul style="list-style-type: none"> <li>President / Executive Officer</li> </ul>
<p><b>5. TO DEVELOP PLANS FOR FUTURE GROWTH AND INCREASED CAPACITY, ENSURING U3A BENDIGO REMAINS RELEVANT TO THE OVER 65'S COMMUNITY OF THE CITY OF GREATER BENDIGO:</b></p> <p><b>L. Future Growth and Capacity – Memberships extrapolated to approx 1200 members by 2025</b></p>	<ul style="list-style-type: none"> <li>Projected membership as at December 2019 and the basis of the 2019 Budget is that our Members will increase to 680 by the end of 2019</li> <li>Relevance to over 65s??</li> </ul>	<ul style="list-style-type: none"> <li><b>680 by end 2019</b></li> </ul>		<ul style="list-style-type: none"> <li><b>766 by 2020</b></li> <li><b>852 by 2021</b></li> <li><b>938 by 2022</b></li> <li><b>1024 by 2023</b></li> <li><b>1110 by 2024</b></li> <li><b>1196 (1200) by 2025</b></li> </ul>		<ul style="list-style-type: none"> <li>President, Treasurer, Executive Officer, &amp; Course Coordinator</li> <li>Course Coordinator, Network Coordinator</li> </ul>



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<b>M. Venues, Membership, IT capacity, Teaching resources to be identified and planned for</b>	<ul style="list-style-type: none"> <li>Still to plan for</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li>President, Treasurer, Executive Officer, Course Coordinator, IT Coordinator</li> </ul>
<b>N. To continue to foster an environment of a caring, sharing and safe organisation</b>	<ul style="list-style-type: none"> <li>Still to plan for</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li>President, Executive Officer, CoM and Members</li> </ul>

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<p><b>6. To CONTINUE TO DEVELOP CAPACITY BOTH IN VENUE CAPACITY AND THE FOSTERING OF LEADERS, CONVENORS, COMMITTEE MEMBERS AND SUPPORT STAFF:</b></p> <p><b>O. Venue capacity – if our extrapolated calculations are correct we will have 1200 members by 2025, and we will need to run at least 28 extra courses / activities by 2025</b></p>	<ul style="list-style-type: none"> <li>Establish “small annexes” in other areas of Bendigo such as Eaglehawk, Epsom, Maiden Gully, Strathfieldsaye, White Hills and Heathcote &amp; Echuca (u3a)</li> <li>Monitor number of courses / activities and report back to CoM and Members at Monthly Gatherings</li> <li>Recruit potential Convenors to run new courses or activities</li> </ul>	<ul style="list-style-type: none"> <li>Explore other U3As - possible annexations. Need to explore further</li> <li>Retention of existing activities by <b>October 2019 for the 2020 Prospectus</b></li> <li>4 new activities planned by <b>October 2019</b> for the <b>2020 Prospectus</b></li> <li>Regularly canvass Members at Gatherings and in the BUZZ for new activities <b>Monthly in 2019</b></li> </ul>				<ul style="list-style-type: none"> <li>President, Treasurer, Executive Officer</li> <li>Executive Officer, &amp; Course Coordinator</li> <li>Executive Officer, &amp; Course Coordinator</li> <li>Course Coordinator</li> </ul>

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<p><b>P. Foster and develop Leadership, Convenors, Committee Members and Support staff</b></p>	<ul style="list-style-type: none"> <li>• Run skills development Workshops for Committee Members 3 times a year</li> <li>• Build capability of U3A Bendigo CoM members in the use of technology etc</li> <li>• Develop support programs for Leaders and Convenors</li> <li>• Run information and training days for Members</li> <li>• First Aid courses for appropriate coordinators/leaders</li> </ul>	<ul style="list-style-type: none"> <li>• 1st Skills Development Workshop in <b>June 2019</b> - Committee Skills</li> <li>• 2nd Skills Development Workshop in <b>August 2019</b> - IT Skills for CoM members</li> <li>• 3rd Skills Development Workshop in <b>November 2019</b> - to be agreed by CoM Members</li> <li>• Training for Members: UMAS access and use and First Aid</li> </ul>				<ul style="list-style-type: none"> <li>• President, Executive Officer &amp; Course Coordinator</li> <li>• President, Executive Officer, IT Coordinator &amp; Course Coordinator</li> <li>• President, Executive Officer &amp; Course Coordinator</li> <li>• President, Executive Officer &amp; Course Coordinator</li> </ul>

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<p>7. DEVELOP RELATIONSHIPS AND LIAISE WITH OTHER RETIREMENT VILLAGES AND AGED CARE FACILITIES</p> <p>Q. Further develop the use of Retirement Villages and Neighbourhood Houses as venues</p>	<ul style="list-style-type: none"> <li>Continue to offer entertainment at aged care facilities with our guitar group, choir, music group, ukulele group and radio players etc</li> <li>Create "partnerships" with Aged Care facilities managers to use their rooms and extend our offerings to our Members and the facilities' Residents</li> </ul>	<ul style="list-style-type: none"> <li>On-going</li> <li>2 more venues / facilities by December 2019</li> </ul>				<ul style="list-style-type: none"> <li>President, Executive Officer, Course Coordinator and U3A Groups</li> <li>President, Treasurer, Executive Officer, Course Coordinator and U3A Groups</li> </ul>

*This is a "dynamic" document, in that it is being continuously developed throughout the years of the plan.*

**Authorisation:**

Endorsed by the Members at the **U3A Bendigo AGM on Wednesday 24th April 2019**

Further details on Milestones in the Strategic Plan and **minuted as such on 4<sup>th</sup> March 2019**.  
 Details as to how this plan will be implemented and who has **ownership of the Strategic Plan was minuted as such on 3<sup>rd</sup> December 2018**.

This Strategys' Objectives were **adopted by the Committee Of Management** of U3A Bendigo Incorporated, and **minuted as such on 1<sup>st</sup> November 2018**.

Details as to how the plan and its milestones will be implemented are currently being developed by the Strategic Planning Sub-Committee.  
**The Sub-Committee consists of Jill McArthur, Robin Bragg, Mark King and Lyn Goodall.**